

# 2014

ePlan Review is a web-based solution that will allow building plans to be submitted electronically, improve the plan review cycle, reduce costs associated with obtaining residential and commercial construction permits, as well as support green initiatives.

## City of Gresham ePlan Review Applicant User Guide During Plan Review

# *ePlan*

## Electronic Review

### City of Gresham Contact Information

#### Community Development

*Permit Services*

*Building Division*

(503)618-2845

*Version 4*

City of Gresham

May 2014

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This guide will help you review the status of your project while in plan review, view and download requested revisions and resubmit your project.

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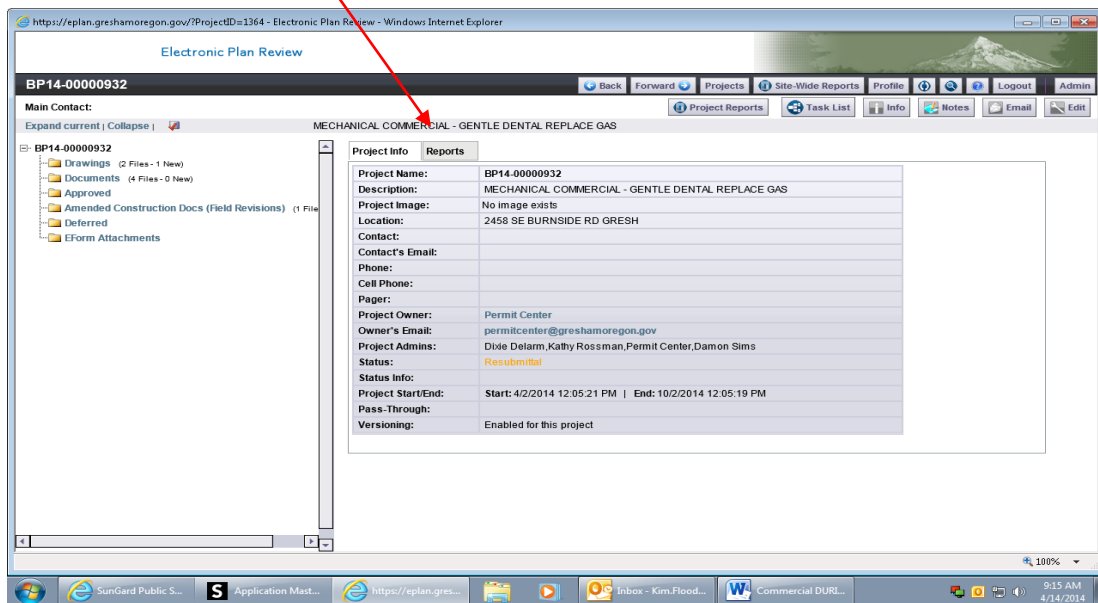
**Don't Forget – when you see\*\*\*, we are bringing your attention to specific information you need in order to aid in the success of your project.**

# City of Gresham ePlan Review – DURING PLAN REVIEW

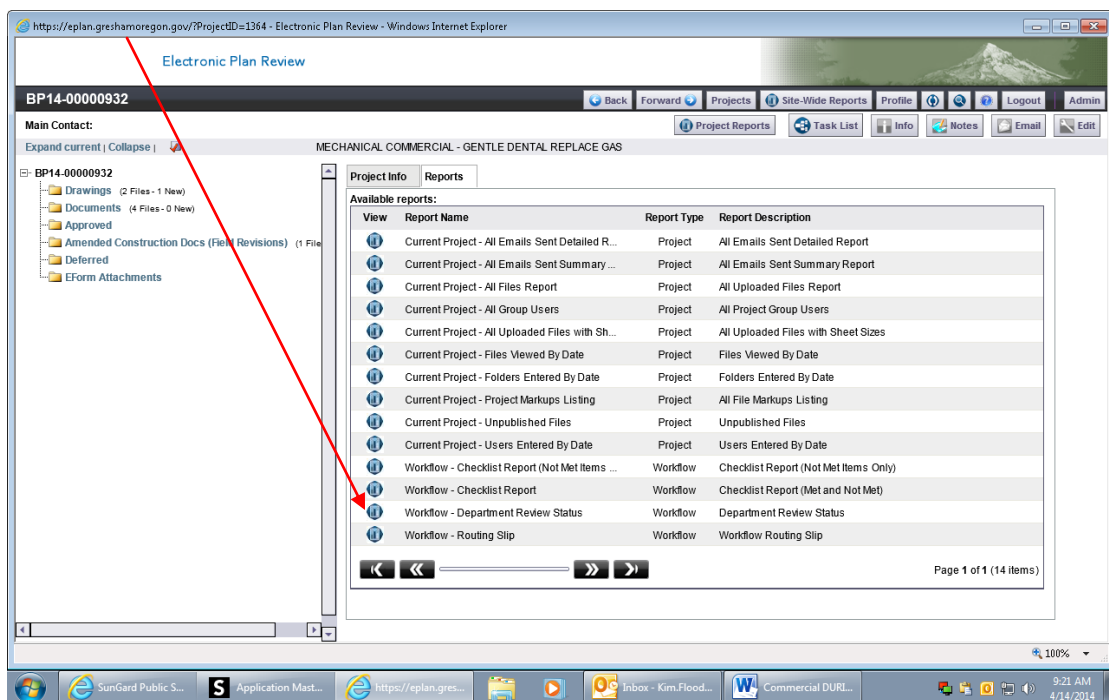
## During Plan Review

Once your project is in review, you can check the status of plan review anytime.

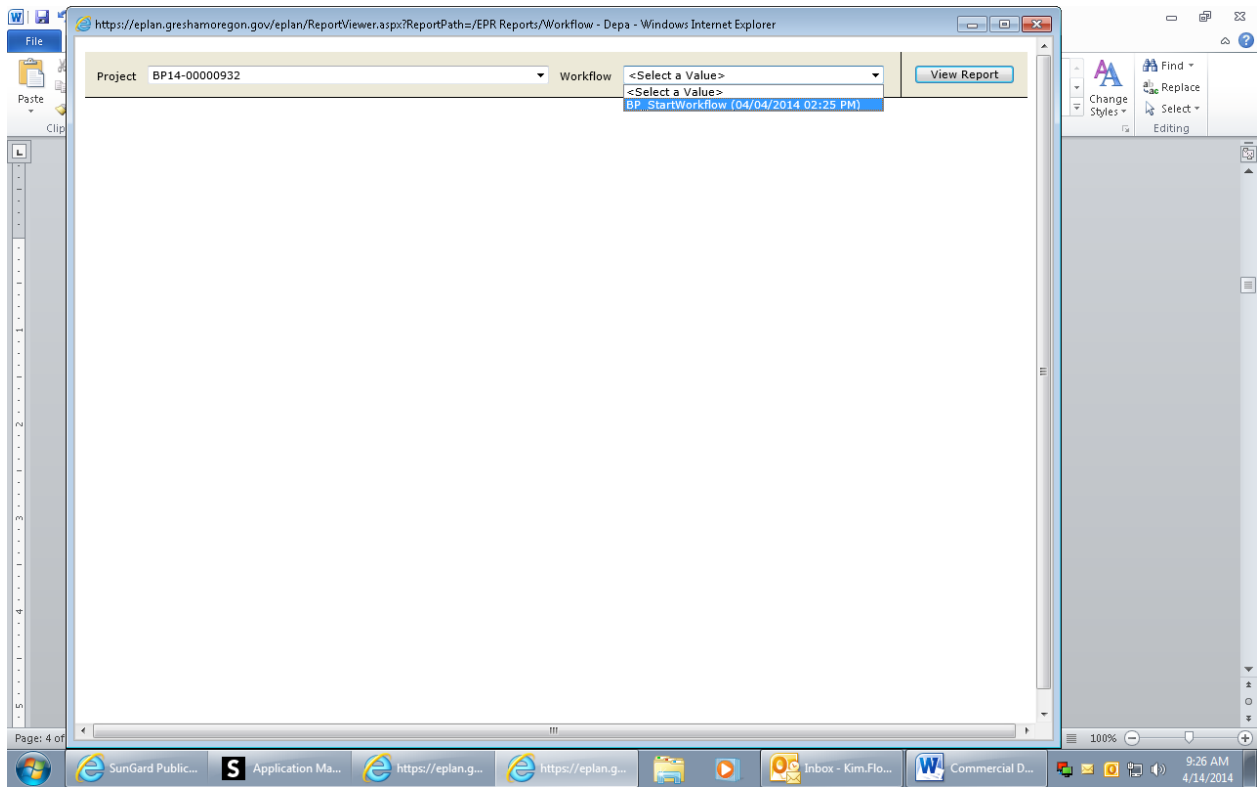
1. Simply log into ePlan review and select the appropriate project link.
2. Click on the Reports tab.



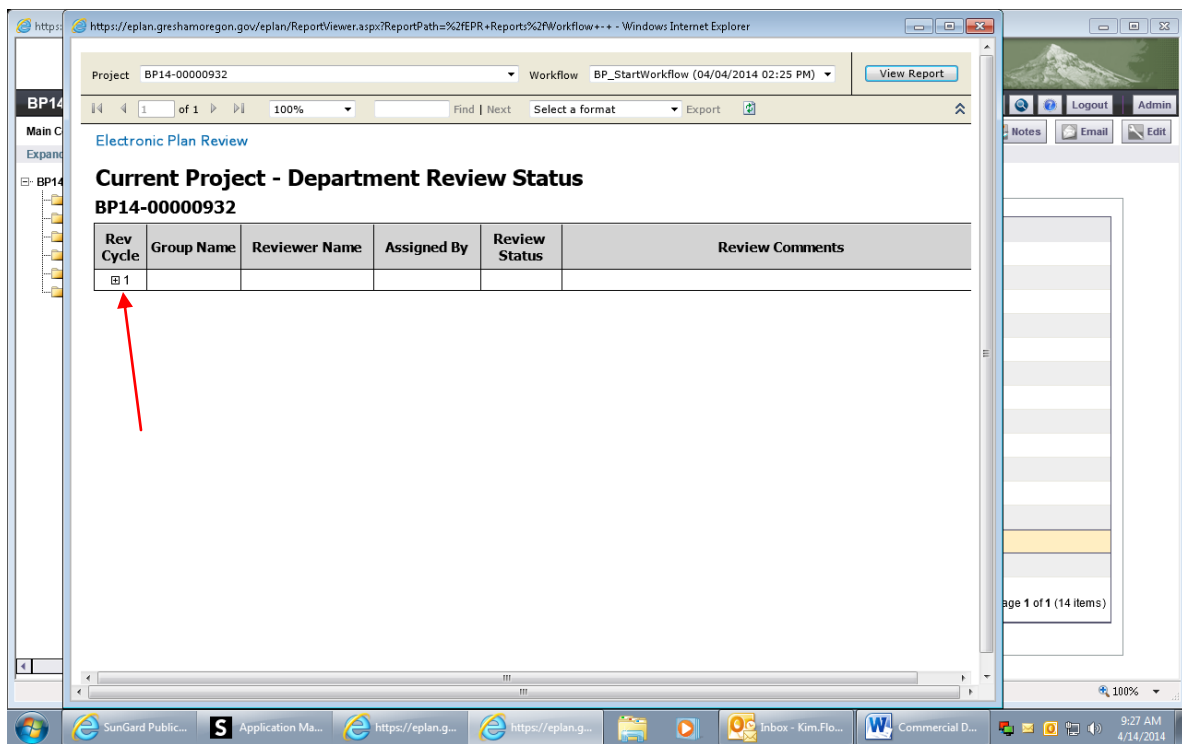
3. Click on Workflow – Department Review Status



## City of Gresham ePlan Review – DURING PLAN REVIEW

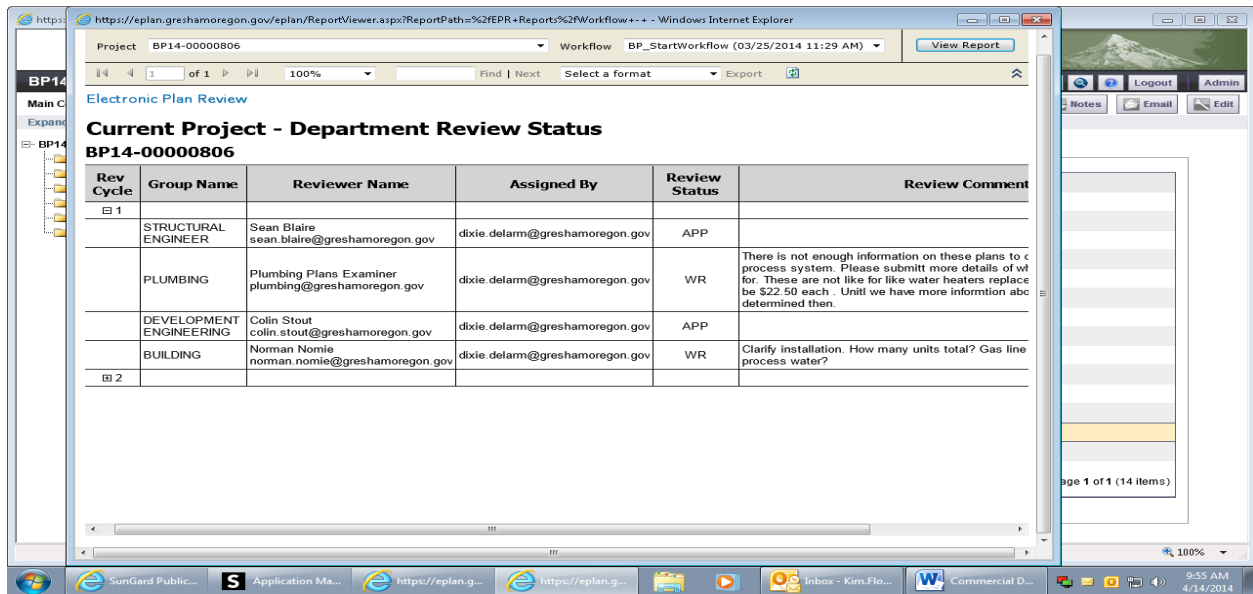


4. Click on the drop down arrow under Workflow and highlight the BP\_StartWorkflow. Then click the View Report button.



5. Click the + under Rev Cycle. (There may be multiple review cycles)

## City of Gresham ePlan Review – DURING PLAN REVIEW



The screenshot shows a web application interface for reviewing plans. The main content area displays a table titled 'Current Project - Department Review Status' for project BP14-00000806. The table has six columns: Rev Cycle, Group Name, Reviewer Name, Assigned By, Review Status, and Review Comment. The data is organized into two review cycles, each with three rows representing different departments: Structural Engineering, Plumbing, and Development Engineering. The review status for each row is either 'APP' (Approved) or 'WR' (Waiting Revisions). The review comments provide specific feedback on the plans.

Rev Cycle	Group Name	Reviewer Name	Assigned By	Review Status	Review Comment
1	STRUCTURAL ENGINEER	Sean Blaire sean.blaire@greshamoregon.gov	dixie.delam@greshamoregon.gov	APP	
	PLUMBING	Plumbing Plans Examiner plumbing@greshamoregon.gov	dixie.delam@greshamoregon.gov	WR	There is not enough information on these plans to c process system. Please submit more details of w for. These are not like for like water heaters replace be \$22.50 each. Until we have more information abc determined then.
	DEVELOPMENT ENGINEERING	Colin Stout colin.stout@greshamoregon.gov	dixie.delam@greshamoregon.gov	APP	
2	BUILDING	Norman Nomie norman.nomie@greshamoregon.gov	dixie.delam@greshamoregon.gov	WR	Clarify installation. How many units total? Gas line process water?

You can view each plan reviewer's status and any general comments they have made.

**ASI** – Assigned – the project has been routed to the review agency and waiting for the reviewer to accept the project.

**IR** – In Review – the reviewer has accepted the project and has started the review or the project is in line to be reviewed.

**WR** – Waiting Revisions – the reviewer has completed their review and has comments that need to be addressed.

**APP** – Approved – the reviewer has completed the review and there are no corrections needed.

## City of Gresham ePlan Review – DURING PLAN REVIEW

To view markups/changemarks to the drawings follow the same steps as above but choose Project Markups Listing from the Reports tab.

The screenshot shows the 'Electronic Plan Review' web application in a Windows Internet Explorer browser. The address bar displays 'https://eplan.greshamoregon.gov/?ProjectID=1355'. The page title is 'Electronic Plan Review'. The main content area is for project 'BP14-00000806', titled 'COMMERCIAL MISCELLANEOUS (MINOR) - Teeny Foods solar HotWater Heaters'. On the left, a tree view shows folders for 'Drawings', 'Documents', 'Approved', 'Amended Construction Docs (Field Revisions)', 'Deferred', and 'EForm Attachments'. The 'Reports' tab is active, displaying a table of available reports. The 'Current Project - Project Markups Listing' report is highlighted. The table has columns for 'View', 'Report Name', 'Report Type', and 'Report Description'. The bottom of the page shows a pagination bar with 'Page 1 of 1 (14 items)' and a taskbar at the very bottom with various application icons and the system clock showing 9:58 AM on 4/14/2014.

View	Report Name	Report Type	Report Description
	Current Project - All Emails Sent Detailed R...	Project	All Emails Sent Detailed Report
	Current Project - All Emails Sent Summary ...	Project	All Emails Sent Summary Report
	Current Project - All Files Report	Project	All Uploaded Files Report
	Current Project - All Group Users	Project	All Project Group Users
	Current Project - All Uploaded Files with Sh...	Project	All Uploaded Files with Sheet Sizes
	Current Project - Files Viewed By Date	Project	Files Viewed By Date
	Current Project - Folders Entered By Date	Project	Folders Entered By Date
	<b>Current Project - Project Markups Listing</b>	<b>Project</b>	<b>All File Markups Listing</b>
	Current Project - Unpublished Files	Project	Unpublished Files
	Current Project - Users Entered By Date	Project	Users Entered By Date
	Workflow - Checklist Report (Not Met Items ...	Workflow	Checklist Report (Not Met Items Only)
	Workflow - Checklist Report	Workflow	Checklist Report (Met and Not Met)
	Workflow - Department Review Status	Workflow	Department Review Status
	Workflow - Routing Slip	Workflow	Workflow Routing Slip

Although you can begin incorporating the changes you see into your project plans, do so with caution. Until a reviewer has changed their status to waiting revisions (WR), the revisions they request may change. Once all plan reviewers are approved or waiting revisions, you will receive an automated email indicating revisions are required.

## REVISIONS REQUIRED

### Review Requested Corrections

If corrections are requested, please follow these steps:

1. You will receive an email notification from ePlan Review requesting corrected/revised drawings and/or documents.
2. Click the 'Log in to ePlan Review' link in your email. Log in to ePlan Review. You will be taken directly to the project to access the corrections requested.
3. Click the task 'ApplicantResubmit' in the task list below the main screen.
4. The eform will automatically open for you.
5. Scroll down to the Department Review section. There may be issues not related to a drawing or document of which you need to be aware. If so, reviewers will have made comments in the Status & Notes column.

### Viewing/Exporting Markups

A 'Markup' (complete review) can have one or more 'Change Marks' (individual comments). Change Marks are created to quickly identify a revision and associated comments.

Typically, all 'Markups' (reviews) that contain any 'Change Marks' will require a subsequent re-submittal of new drawings or documents prior to approval of your project.

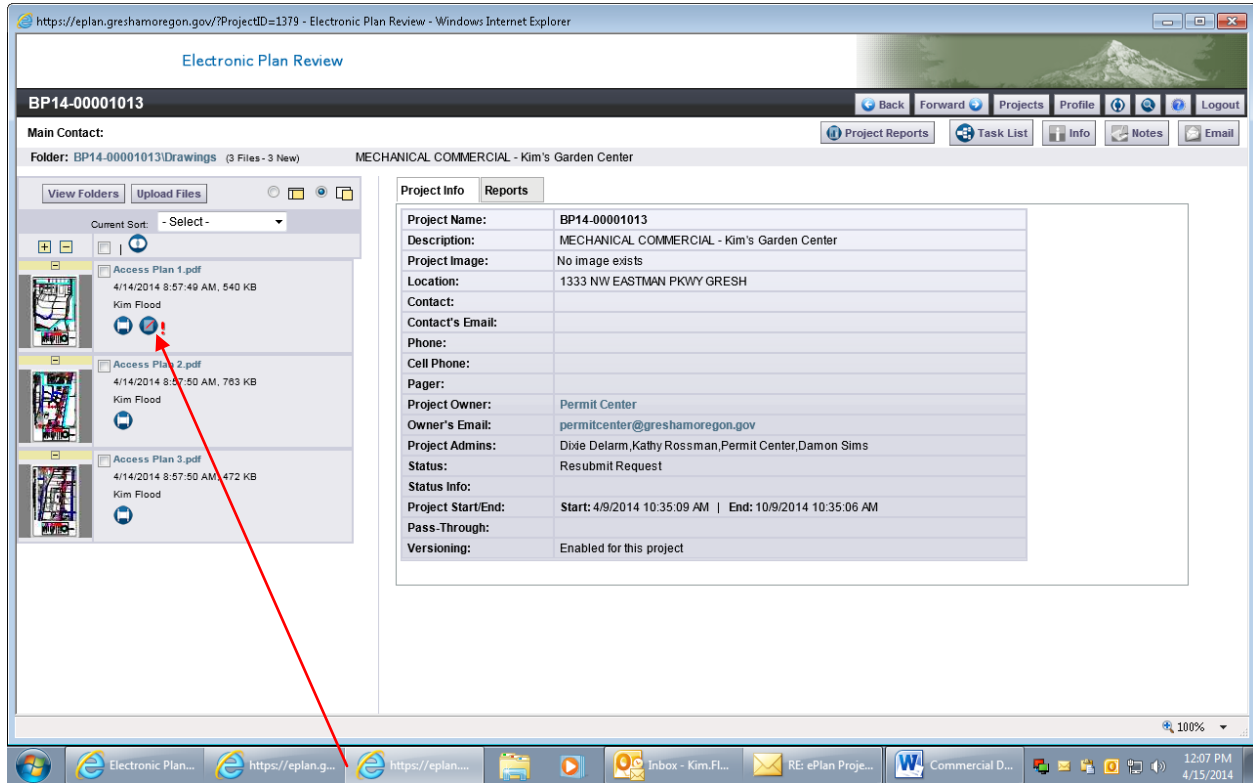
There are 2 options to review and/or export change marks: Viewing drawings or documents and Publishing a Markups Report.

## City of Gresham ePlan Review – DURING PLAN REVIEW

### View Project Drawings or Documents

To view requested revisions for drawings and/or documents, simply enter a project folder by clicking the project link.

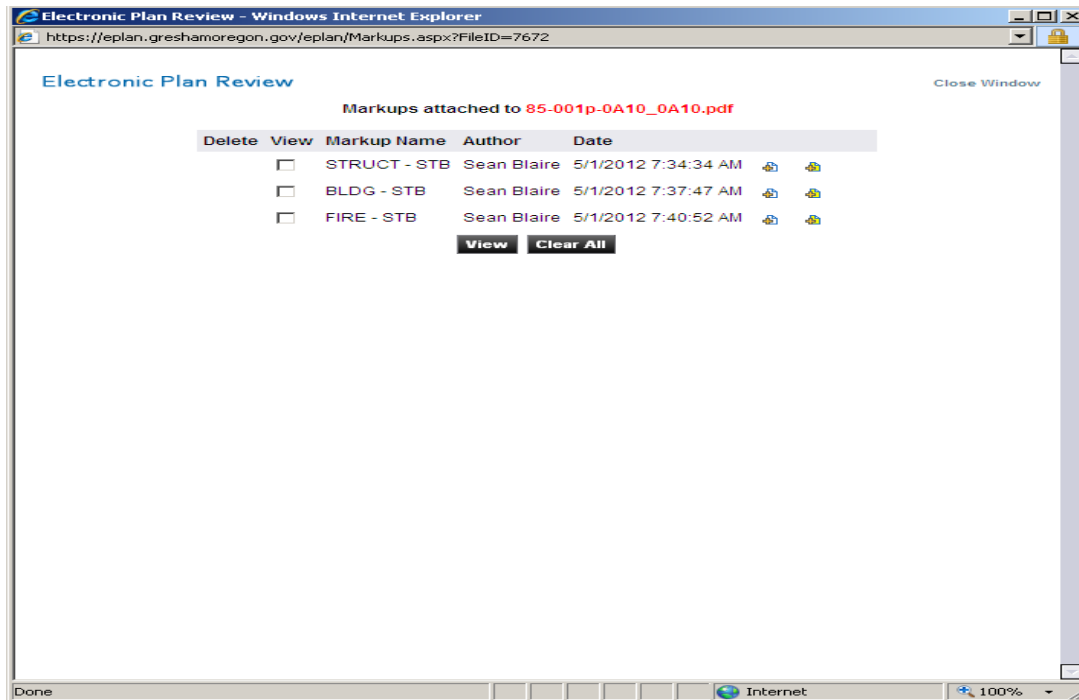
1. Click either the Drawings or Documents folder.



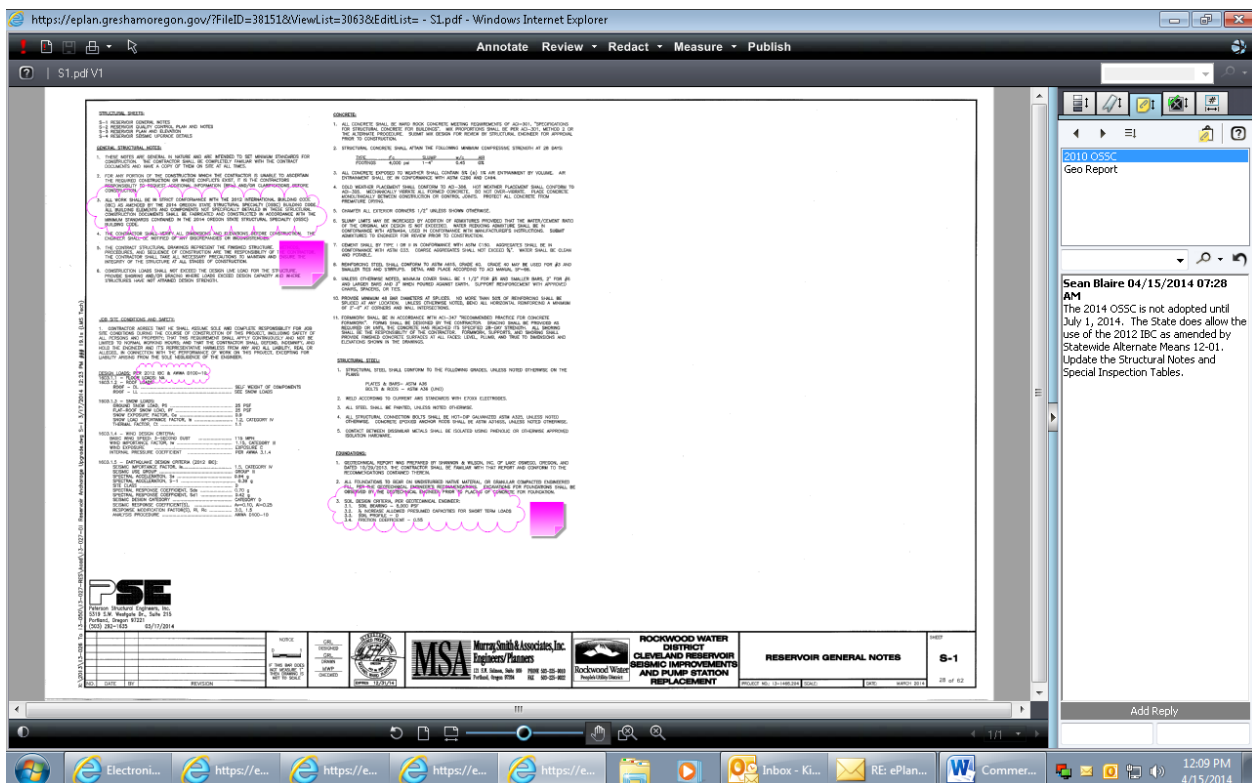
2. Click on the Markups button. An 'exclamation point' on any drawing page or document indicates revisions are being requested.



# City of Gresham ePlan Review – DURING PLAN REVIEW



3. Click on the View check box for any Markups you wish to view.
4. Click View. The file will open in Brava Viewer, with the markup overlaid on the file for review only as shown below.



## City of Gresham ePlan Review – DURING PLAN REVIEW

5. Selecting any of the topics moves the screen to that change mark and shows you the written change being requested.

The screenshot displays the City of Gresham ePlan Review interface. The main window shows a PDF document titled "S1.pdf V1" with various annotations and change marks. A red arrow points from the text "5. Selecting any of the topics moves the screen to that change mark and shows you the written change being requested." to the "2010 OSSC Geo Report" entry in the sidebar. The sidebar also shows a comment from Sean Blaire dated 04/15/2014 07:28 AM, stating: "The 2014 OSSC is not adopted until July 1, 2014. The State does allow the use of the 2012 IBC as amended by Statewide Alternate Means 12-01. Update the Structural Notes and Special Inspection Tables." The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 12:10 PM on 4/15/2014.

# City of Gresham ePlan Review – DURING PLAN REVIEW

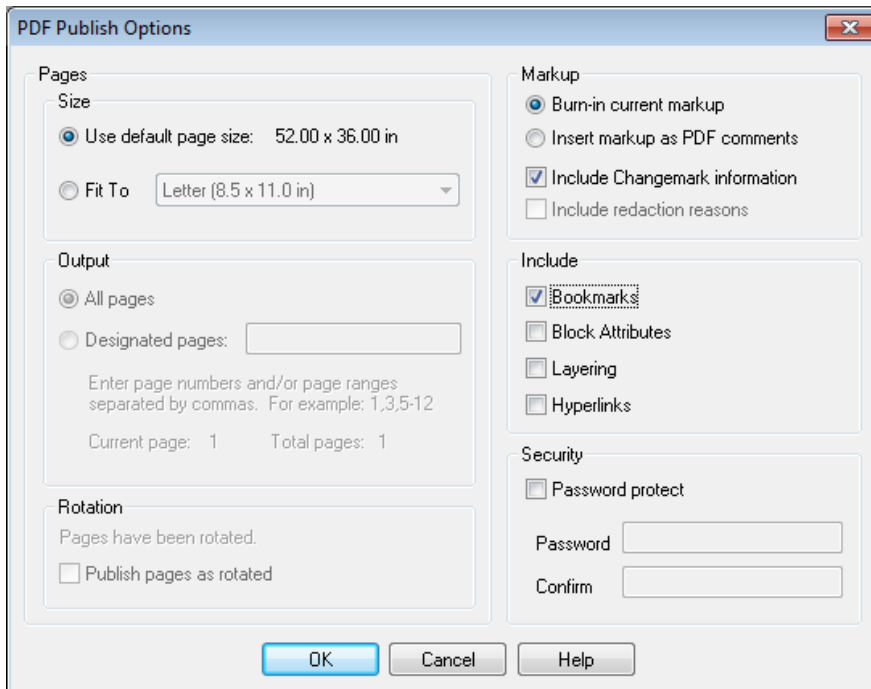
## Export Markups to PDF

1. Click on Publish button.

The screenshot shows a web browser window displaying the City of Gresham ePlan Review interface. The address bar shows the URL: <https://eplan.greshamoregon.gov/?FileID=38151&ViewList=3063&EditList=-SL.pdf>. The browser window has a toolbar with buttons for Annotate, Review, Redact, Measure, and Publish. The main content area displays a PDF document titled "S1.pdf V1". The document is a technical drawing or plan, likely related to a reservoir, with various annotations and a sidebar on the right. The sidebar contains a comment from Sean Blaire dated 04/15/2014 07:28 AM, stating: "The 2014 OSSC is not adopted until July 1, 2014. The State does allow the use of the 2012 IBC as amended by Statewide Alternate Means 12-01. Update the Structural Notes and Special Inspection Tables." The bottom of the browser window shows the Windows taskbar with several open applications, including Electron, Internet Explorer, and Outlook.

2. Click the Publish to PDF.

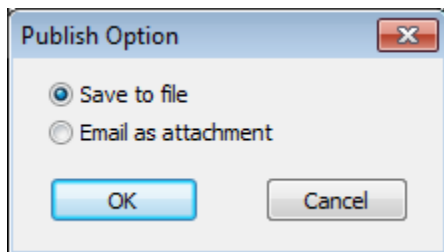
## City of Gresham ePlan Review – DURING PLAN REVIEW



3. On the PDF Publish Options select the following:
  - a. Under “Markup “ select Burn-in current Markup
  - b. Select “Include Changemark Information”
  - c. Under the “ Include” section select Bookmarks
  - d. Click OK

9. On the Publish Option pop up click Save to File.

10. Click OK.

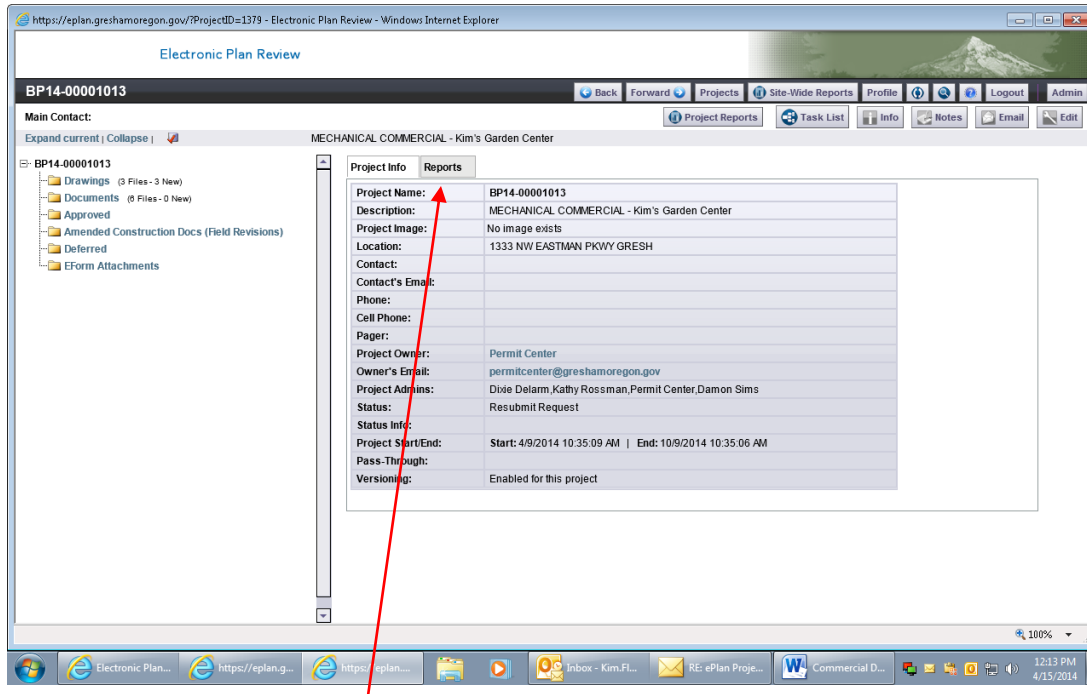


11. Select where you are going to save this file.
12. Name the File.
13. Click Save.
14. Open the saved file. It will include the change marks (which will be numbered) on the drawing along with a second page with the comments associated with those change marks.
15. You will need to do this for each page that has markups.

### Publishing MarkUps to a Report in Excel

You may also publish change marks, without the corresponding drawing pages.

1. Select the Project link from the main projects page.



2. Click on the Reports tab.

## City of Gresham ePlan Review – DURING PLAN REVIEW

Electronic Plan Review

BP14-00001013

Main Contact: MECHANICAL COMMERCIAL - Kim's Garden Center

Expand current | Collapse |

BP14-00001013

- Drawings (3 Files - 3 New)
- Documents (6 Files - 0 New)
- Approved
- Amended Construction Docs (Field Revisions)
- Deferred
- EForm Attachments

Project Info | Reports

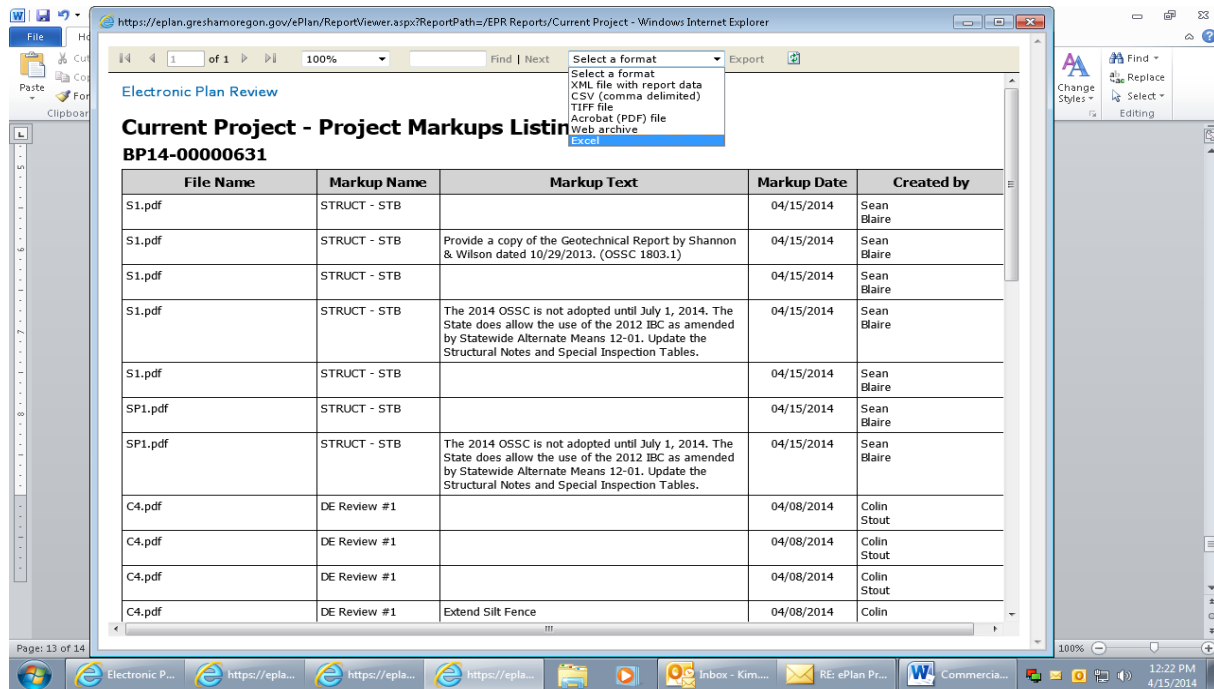
Available reports:

View	Report Name	Report Type	Report Description
	Current Project - All Emails Sent Detailed R...	Project	All Emails Sent Detailed Report
	Current Project - All Emails Sent Summary ...	Project	All Emails Sent Summary Report
	Current Project - All Files Report	Project	All Uploaded Files Report
	Current Project - All Group Users	Project	All Project Group Users
	Current Project - All Uploaded Files with Sh...	Project	All Uploaded Files with Sheet Sizes
	Current Project - Files Viewed By Date	Project	Files Viewed By Date
	Current Project - Folders Entered By Date	Project	Folders Entered By Date
	<b>Current Project - Project Markups Listing</b>	Project	<b>All File Markups Listing</b>
	Current Project - Unpublished Files	Project	Unpublished Files
	Current Project - Users Entered By Date	Project	Users Entered By Date
	Workflow - Checklist Report (Not Met Items ...	Workflow	Checklist Report (Not Met Items Only)
	Workflow - Checklist Report	Workflow	Checklist Report (Met and Not Met)
	Workflow - Department Review Status	Workflow	Department Review Status
	Workflow - Routing Slip	Workflow	Workflow Routing Slip

Page 1 of 1 (14 items)

3. Click on the Current Project – Project Markups Listing link.

## City of Gresham ePlan Review – DURING PLAN REVIEW



Electronic Plan Review

**Current Project - Project Markups Listing**  
BP14-00000631

File Name	Markup Name	Markup Text	Markup Date	Created by
S1.pdf	STRUCT - STB		04/15/2014	Sean Blaire
S1.pdf	STRUCT - STB	Provide a copy of the Geotechnical Report by Shannon & Wilson dated 10/29/2013. (OSSC 1803.1)	04/15/2014	Sean Blaire
S1.pdf	STRUCT - STB		04/15/2014	Sean Blaire
S1.pdf	STRUCT - STB	The 2014 OSSC is not adopted until July 1, 2014. The State does allow the use of the 2012 IBC as amended by Statewide Alternate Means 12-01. Update the Structural Notes and Special Inspection Tables.	04/15/2014	Sean Blaire
S1.pdf	STRUCT - STB		04/15/2014	Sean Blaire
SP1.pdf	STRUCT - STB		04/15/2014	Sean Blaire
SP1.pdf	STRUCT - STB	The 2014 OSSC is not adopted until July 1, 2014. The State does allow the use of the 2012 IBC as amended by Statewide Alternate Means 12-01. Update the Structural Notes and Special Inspection Tables.	04/15/2014	Sean Blaire
C4.pdf	DE Review #1		04/08/2014	Colin Stout
C4.pdf	DE Review #1		04/08/2014	Colin Stout
C4.pdf	DE Review #1		04/08/2014	Colin Stout
C4.pdf	DE Review #1	Extend Silt Fence	04/08/2014	Colin

4. Click the drop down arrow next to the Export link. Choose which format you would like to save it in. Click the Export link.
5. Click Open to view the change marks or Save to save them to your desk top. After viewing you can also Save them to your desktop from the File tab.

## City of Gresham ePlan Review – DURING PLAN REVIEW

Current Project - Project Markups Listing [Protected View] [Compatibility Mode] - Microsoft Excel

Protected View This file originated from an Internet location and might be unsafe. Click for more details. Enable Editing

Electronic Plan Review

Current Project - Project Markups Listing

BP14-00000631

File Name	Markup Name	Markup Text	Markup Date	Created by
S1.pdf	STRUCT - STB		04/15/2014	Sean
S1.pdf	STRUCT - STB	Provide a copy of the Geotechnical Report by Shannon & Wilson dated 10/29/2013. (OSSC 1803.1)	04/15/2014	Sean Blaire
S1.pdf	STRUCT - STB		04/15/2014	Sean
S1.pdf	STRUCT - STB	The 2014 OSSC is not adopted until July 1, 2014. The State does allow the use of the 2012 IBC as amended by Statewide Alternate Means 12-01. Update the Structural Notes and Special Inspection Tables.	04/15/2014	Sean Blaire
S1.pdf	STRUCT - STB		04/15/2014	Sean
SP1.pdf	STRUCT - STB		04/15/2014	Sean
SP1.pdf	STRUCT - STB	The 2014 OSSC is not adopted until July 1, 2014. The State does allow the use of the 2012 IBC as amended by Statewide Alternate Means 12-01. Update the Structural Notes and Special Inspection Tables.	04/15/2014	Sean Blaire
C4.pdf	DE Review #1		04/08/2014	Colin
C4.pdf	DE Review #1		04/08/2014	Colin
C4.pdf	DE Review #1		04/08/2014	Colin
C4.pdf	DE Review #1	Extend Silt Fence	04/08/2014	Colin
C4.pdf	DE Review #1		04/08/2014	Colin
C4.pdf	DE Review #1		04/08/2014	Colin
C4.pdf	DE Review #1		04/08/2014	Colin
C4.pdf	DE Review #1	Follow contour with silt fence	04/08/2014	Colin
C4.pdf	DE Review #1		04/08/2014	Colin
C4.pdf	DE Review #1		04/08/2014	Colin
C4.pdf	DE Review #1		04/08/2014	Colin
C4.pdf	DE Review #1	Update notes	04/08/2014	Colin
C4.pdf	DE Review #1		04/08/2014	Colin

Current Project - Project Marku

Note: The blank lines are the arrows, clouds, etc. that the plan reviewer used. You can delete those empty rows and just keep the rows with text if you prefer.

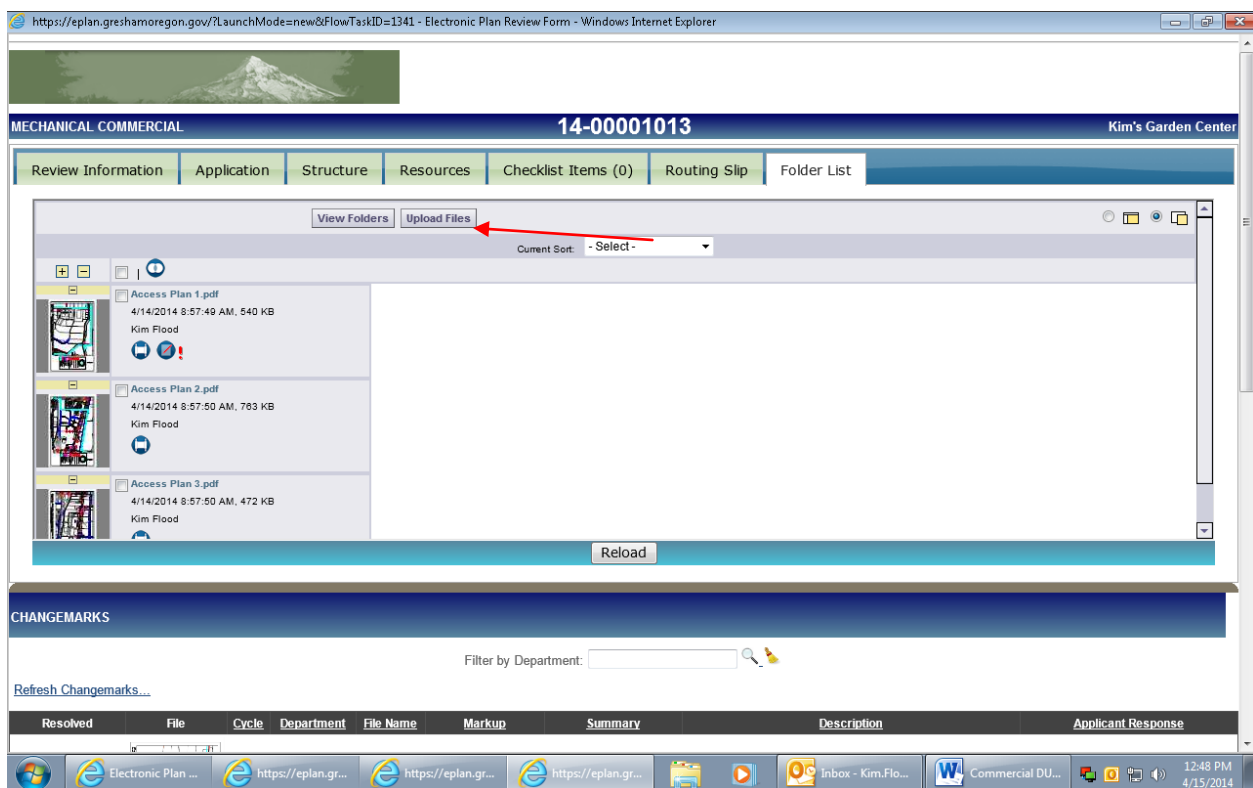


## Applicant Resubmit Process

When you have made all the requested revisions to drawings and/or documents you are ready to upload again. You can upload from the e-form.

- \*\*\*NOTE: Corrected files shall always be re-submitted with the **EXACT SAME** file name as the original submittal (no extra spaces, periods, etc.) The system will automatically add a version number to resubmitted drawings for you so the reviewers can easily differentiate between revisions and review the most recent drawings. \*\*\*

1. Log into ePlan Review. Click the task 'ApplicantResubmit'. The e-form will open.
2. Click the Folder List tab at the top of the form.



3. Click the Upload Files. Upload revisions.
4. Once you are done uploading scroll down to the Task Instructions section.

http://eplan.greshamoregon.gov/?LaunchMode=new&FlowTaskID=1341 - Electronic Plan Review Form - Windows Internet Explorer

No  1 STRUCTURAL Access ENGINEER Plan 1.pdf [Structural- KJF](#) Test Test

I have uploaded a corrected drawing.

**Save Changemark Updates**

☐ Show All Changemarks for All Cycles

**DEPARTMENT REVIEW - Review Cycle: 1**

CYCLE	DEPARTMENT	REVIEWED BY	STATUS & NOTES
<input checked="" type="checkbox"/>	1	STRUCTURAL ENGINEER KIM FLOOD KIM.FLOOD@GRESHAMOREGON.GOV	WAITING REVISIONS <a href="#">VIEW CHECKLIST</a>

**Task Instructions**

☒ I have addressed all of the items in the File Markups above that were identified during the Plan Review.

☒ I have uploaded the revised drawings into the "Drawings" folder and, if requested, uploaded any revised documents into the "Documents" folder using the SAME file name as the original files. You can upload files by clicking the Folder List tab above and selecting a folder.

**Complete** **Save And Close**

Email:  **Go**

NavLine BP 8.1

Electronic Plan ... https://eplan.g... https://eplan.g... https://eplan.g... Inbox - Kim.Flo... Commercial D... 1:07 PM 4/15/2014

5. **Click the two boxes where it indicates that you have addressed any items and uploaded revisions.** (Even if you didn't need to upload revisions, you must still click the box)
6. Click the Complete button.

This part of the process may occur multiple times before all plan reviewers have approved your project.